

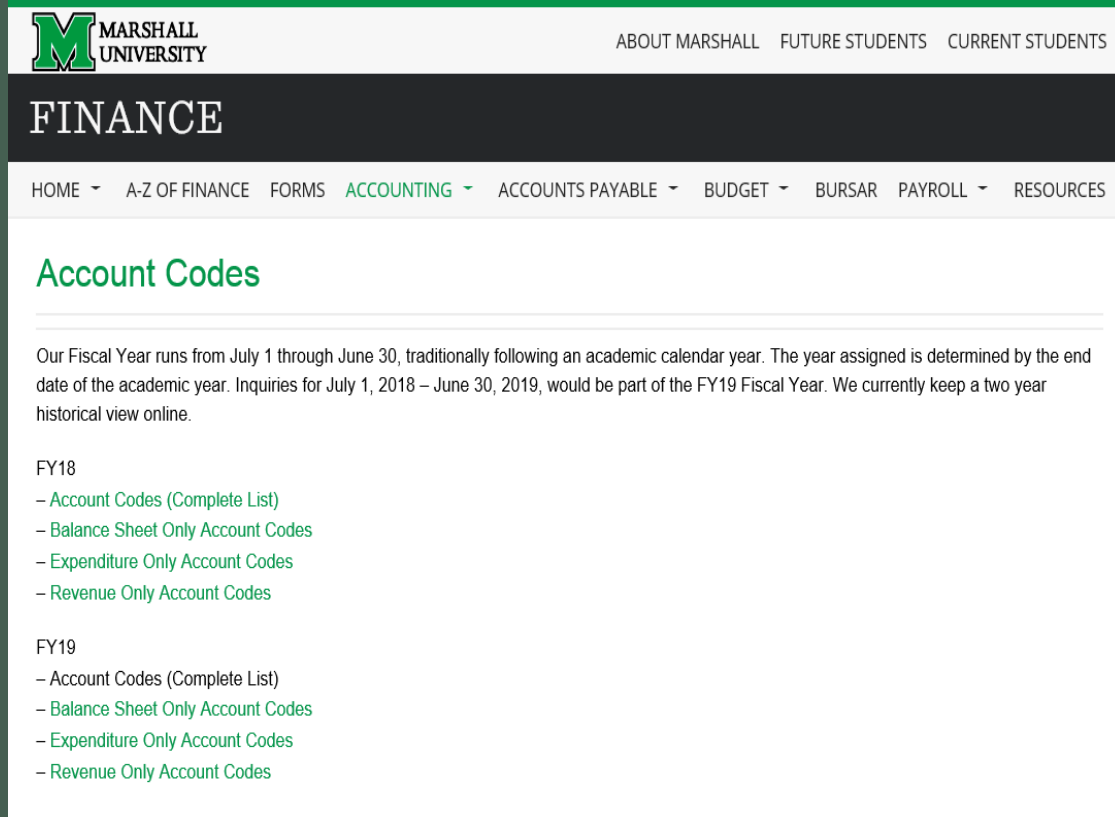


ENTERING
REQUISITIONS INTO
BANNER 9

NOTE:

1. Prior to beginning the entry, have the vendor ID number available. See the manual on How To Find Vendor ID; however, if the vendor is an MU department, contact MJ Blankenship with Accounting to locate the vendor ID number.

2. Know the fund, organizational number, and account code for the expense. Accounts codes are found on the Finance website at <https://www.marshall.edu/finance/account-codes/>



The screenshot shows the Marshall University Finance website. At the top left is the Marshall University logo. To the right are links for "ABOUT MARSHALL", "FUTURE STUDENTS", and "CURRENT STUDENTS". Below the logo is a dark blue header with the word "FINANCE" in white. Underneath is a navigation menu with links: "HOME", "A-Z OF FINANCE", "FORMS", "ACCOUNTING" (highlighted in green), "ACCOUNTS PAYABLE", "BUDGET", "BURSAR", "PAYROLL", and "RESOURCES". The main content area has a green heading "Account Codes". Below this is a paragraph explaining the fiscal year: "Our Fiscal Year runs from July 1 through June 30, traditionally following an academic calendar year. The year assigned is determined by the end date of the academic year. Inquiries for July 1, 2018 – June 30, 2019, would be part of the FY19 Fiscal Year. We currently keep a two year historical view online." There are two sections: "FY18" and "FY19". Each section contains four links: "Account Codes (Complete List)", "Balance Sheet Only Account Codes", "Expenditure Only Account Codes", and "Revenue Only Account Codes".

M MARSHALL UNIVERSITY

ABOUT MARSHALL FUTURE STUDENTS CURRENT STUDENTS

FINANCE

HOME A-Z OF FINANCE FORMS **ACCOUNTING** ACCOUNTS PAYABLE BUDGET BURSAR PAYROLL RESOURCES

Account Codes

Our Fiscal Year runs from July 1 through June 30, traditionally following an academic calendar year. The year assigned is determined by the end date of the academic year. Inquiries for July 1, 2018 – June 30, 2019, would be part of the FY19 Fiscal Year. We currently keep a two year historical view online.

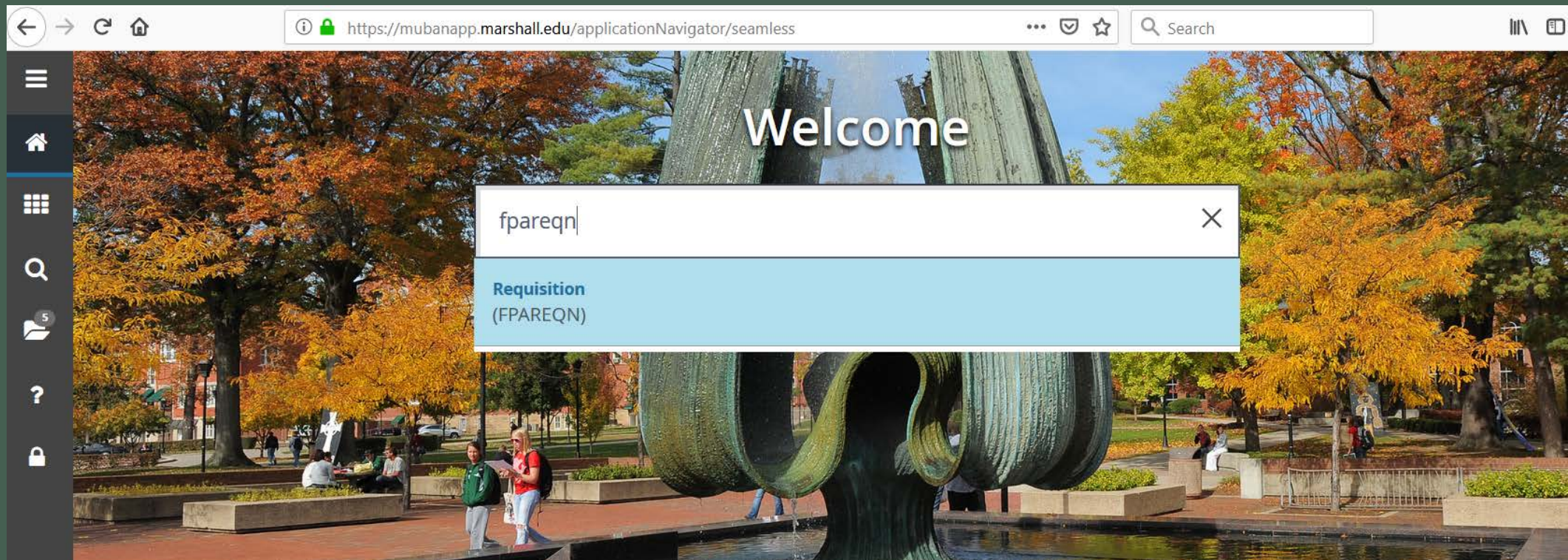
FY18

- [Account Codes \(Complete List\)](#)
- [Balance Sheet Only Account Codes](#)
- [Expenditure Only Account Codes](#)
- [Revenue Only Account Codes](#)

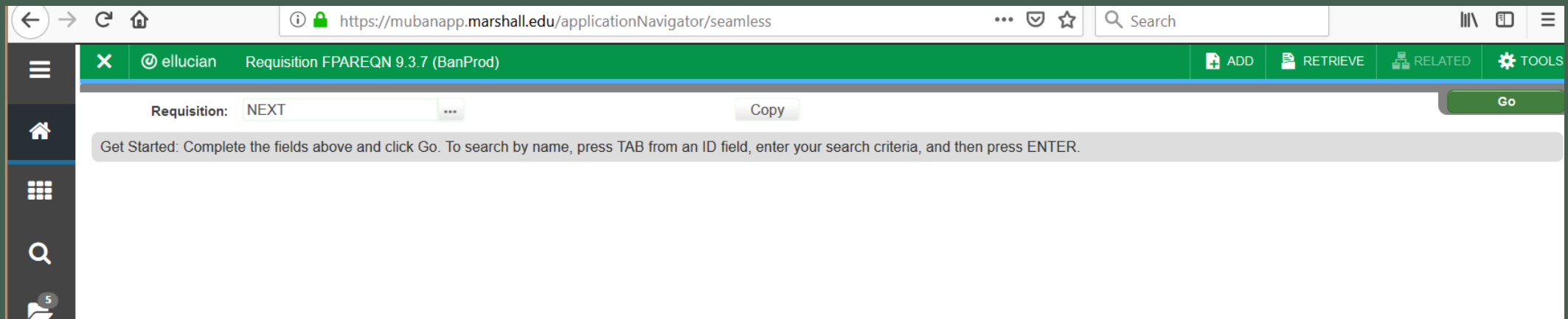
FY19

- [Account Codes \(Complete List\)](#)
- [Balance Sheet Only Account Codes](#)
- [Expenditure Only Account Codes](#)
- [Revenue Only Account Codes](#)

Type **FPAREQN** then press the **ENTER** button.



Type the word **NEXT** then hold the **Alt & Page Down** buttons at the same time or press the **Go** button.



Delivery Date field: Type in the end of the Fiscal Year

Browser address bar: <https://mubanapp.marshall.edu/applicationNavigator/seamless>

Page title: Requisition FPAREQN 9.3.7 (BanProd)

Navigation: ADD, RETRIEVE, RELATED, TOOLS

Requisition: NEXT Start Over

REQUISITION ENTRY: REQUESTOR/DELIVERY Insert Delete Copy Filter

Requisition	NEXT	Comments		<input type="checkbox"/> In Suspense
Order Date *	01/07/2019	Commodity Total	0.00	<input type="checkbox"/> Document Text
Transaction Date *	01/07/2019	Accounting Total	0.00	
Delivery Date *	06/30/2019	<input checked="" type="checkbox"/> Document Level Accounting		

Requestor/Delivery Information | Vendor Information | Commodity/Accounting | Balancing/Completion

REQUISITOR/DELIVERY INFORMATION Insert Delete Copy Filter

Make sure to select the correct **COA** (Chart of Accounts)

COA: 1 (WV State Public Funds)

COA: 2 (MURC Funds)

Requestor/Delivery Information	Vendor Information	Commodity/Accounting	Balancing/Completion
REQUESTOR/DELIVERY INFORMATION + Insert - Delete Copy Filter			
Requestor *	Tracey Brown-Dolinski		Street Line 2
Organization *	...		Street Line 3
COA *	1 ... Marshall University		
Email	browndolinsk@marshall.edu		Contact
			Attention To *
Phone Area Code	304		Building
Phone Number	696-3157		Floor
Phone Extension			City
			State or Province
Fax Area Code			Zip or Postal Code
Fax Number			Nation

Ship To: Select **SEW** or **BIOTEC**

Requestor/Delivery Information	Vendor Information	Commodity/Accounting	Balancing/Completion
REQUESTOR/DELIVERY INFORMATION			
Requestor *	Tracey Brown-Dolinski		
Organization *	...		
COA *	1	...	Marshall University
Email	browndolinsk@marshall.edu		
Phone Area Code	304		
Phone Number	696-3157		
Phone Extension			
Fax Area Code			
Fax Number			
Fax Extension			
Ship To *	SEW ...		
	SEW		
Street Line 1	Marshall University Rec Dept		

Requestor/Delivery Information	Vendor Information	Commodity/Accounting	Balancing/Completion
REQUESTOR/DELIVERY INFORMATION			
Requestor *	Tracey Brown-Dolinski		
Organization *	...		
COA *	1	...	Marshall University
Email	browndolinsk@marshall.edu		
Phone Area Code	304		
Phone Number	696-3157		
Phone Extension			
Fax Area Code			
Fax Number			
Fax Extension			
Ship To *	BIOTEC ...		
	ROBERT C BYRD BIOTECHNOLOGY SCIENCE CENTER		
Street Line 1	ROBERT C BYRD BIOTECHNOLOGY SCIENCE CENTER		

Attention To field:

Type the name and extension of the main contact person, then hold down the **Alt & Page Down** buttons to continue.

Requestor/Delivery Information	Vendor Information	Commodity/Accounting	Balancing/Completion
REQUESTOR/DELIVERY INFORMATION + Insert - Delete Copy Filter			
Requestor *	Tracey Brown-Dolinski		
Organization *	...		
COA *	1 ... Marshall University		
Email	browndolinsk@marshall.edu		
Phone Area Code	304		
Phone Number	696-3157		
Phone Extension			
Fax Area Code			
Fax Number			
Fax Extension			
Ship To *	SEW ...		
Street Line 1	Marshall University Rec Dept		
Street Line 2	201 21st Street		
Street Line 3			
Contact			
Attention To *	Tracey Dolinski 6-3157		
Building			
Floor			
City	Huntington		
State or Province	WV		
Zip or Postal Code	25703		
Nation			
Area Code			
Phone Number			
Extension			

Type in Vendor ID number then press the **TAB** button.
Remember to check for the correct vendor address under the sequence field. Type in the correct sequence number then press the tab button.
Finally, to continue to the next section, hold the **Alt & Page Down** buttons or select the **Commodity/Account** tab.

Transaction Date	07/07/2019	Accounting Total	0.00
Delivery Date	06/30/2019	<input checked="" type="checkbox"/> Document Level Accounting	
Requestor/Delivery Information		Vendor Information	Commodity/Accounting
VENDOR INFORMATION			
Vendor	522208632 ... Sodexo America LLC	Contact	
<input type="checkbox"/> Vendor Hold		Email	
Address Type	PO ...	Phone Area Code	
Sequence	4 ...	Phone Number	
Street Line 1	PO Box 360170	Phone Extension	
Street Line 2		Fax Area Code	
Street Line 3		Fax Number	
City	Pittsburgh	Fax Extension	
State or Province	PA	Discount	...
Zip or Postal Code	15251 6170	Tax Group	...
Nation	United States Of America	Currency	...

REMEMBER:

Write down the requisition number created by Banner.

The screenshot displays the Banner Requisition FPAREQN 9.3.7 (BanProd) interface. The top navigation bar shows the user 'ellucian' and the document title 'Requisition FPAREQN 9.3.7 (BanProd)'. The main content area is titled 'Requisition: R1901383' and is divided into several sections:

- REQUISITION ENTRY: REQUESTOR/DELIVERY**: This section contains input fields for 'Requisition' (R1901383), 'Order Date' (01/07/2019), 'Transaction Date' (01/07/2019), and 'Delivery Date' (06/30/2019). It also includes 'Comments', 'Commodity Total' (0.00), 'Accounting Total' (0.00), and a checked 'Document Level Accounting' option.
- Requestor/Delivery Information**, **Vendor Information**, **Commodity/Accounting** (active), and **Balancing/Completion**: These are the tabs for the current view.
- COMMODITY**: This section features a table with columns: Item, Commodity, Description, U/M, Tax Group, Quantity, Unit Price, and Commodity. Below the table is a pagination control showing '1 of 1' and '10 Per Page'.
- ACCOUNTING**: This section contains input fields for 'Extended Amount', 'Discount', 'Additional', 'Tax', 'Commodity Total', and 'Document Total'.

The bottom of the screen shows the start of an 'ACCOUNTING' table with columns: Sequence, COA, Year, Index, Fund, Orgn, Acct, Prog, Acty, and Loc.

Type **U/M** (Unit of Measure):
HR (hours), EA (each), DOL (dollars), etc.

Remember to use the TAB button to move to the next section.

Delivery Date 06/30/2019 Document Level Accounting

Requestor/Delivery Information Vendor Information **Commodity/Accounting** Balancing/Completion

COMMODITY Insert Delete Copy Filter

Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text	Add Commodity
		Round Table Cloth	EA		1.00	100.0000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1 of 1 | 10 Per Page | Record 1 of 1

Extended Amount Tax Distribute

Discount Commodity Total

Additional Document Total

ACCOUNTING Insert Delete Copy Filter

Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSF Override	NSF Suspe
	1										<input type="checkbox"/>	<input checked="" type="checkbox"/>

< | 1 of 1 | 10 Per Page | Record 1 of 1

% USD

Extended Amount

Description field: If you run out of space, select **RELATED** then **Item Text**.

The screenshot shows a software interface with a green header bar containing 'ADD', 'RETRIEVE', and 'TOOLS' buttons. Below the header is a table with columns for 'Quantity', 'Unit Price', and 'Commodity Text'. A dropdown menu is open on the right side of the table, listing several options: 'Search', 'Review Commodity Information [FOICOMM]', 'Item Text [FOAPOXT]', 'Document Text [FOAPOXT]', and 'Commodity Text [FOATEXT]'. The 'Item Text [FOAPOXT]' option is highlighted.

Quantity	Unit Price	Commodity Text
1.00	100.0000	<input type="checkbox"/>

- Search
- Review Commodity Information [FOICOMM]
- Item Text [FOAPOXT]
- Document Text [FOAPOXT]
- Commodity Text [FOATEXT]

Click the **Go** button.

https://mubanapp.marshall.edu/applicationNavigator/seamless

ellucian Procurement Text Entry FOAPOXT 9.3.6 (BanProd) ADD RETRIEVE RELATED TOOLS

Text Type: *REQ* Code: *R1901383* **Go**

Change Sequence: Item Number: *1*

Vendor: *522208632* *Sodexo America LLC* Commodity: *Round Table Cloth*

Description

Modify Clause: ... Copy Commodity:

Text

Default Increment: *10*

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

Click inside of the **Text** field to type additional information.

ellucian Procurement Text Entry FOAPOXT 9.3.6 (BanProd) ADD RETRIEVE RELATED TOOLS 1

Text Type: REQ Code: R1901383 Change Sequence: Item Number: 1 Vendor: 522208632 Sodexo America LLC Commodity Description: Round Table Cloth Start Over

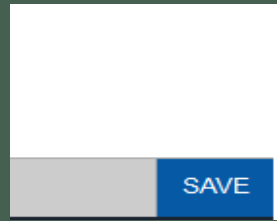
Modify Clause: Copy Commodity Text: Default Increment: 10

PROCUREMENT TEXT ENTRY Insert Delete Copy Filter

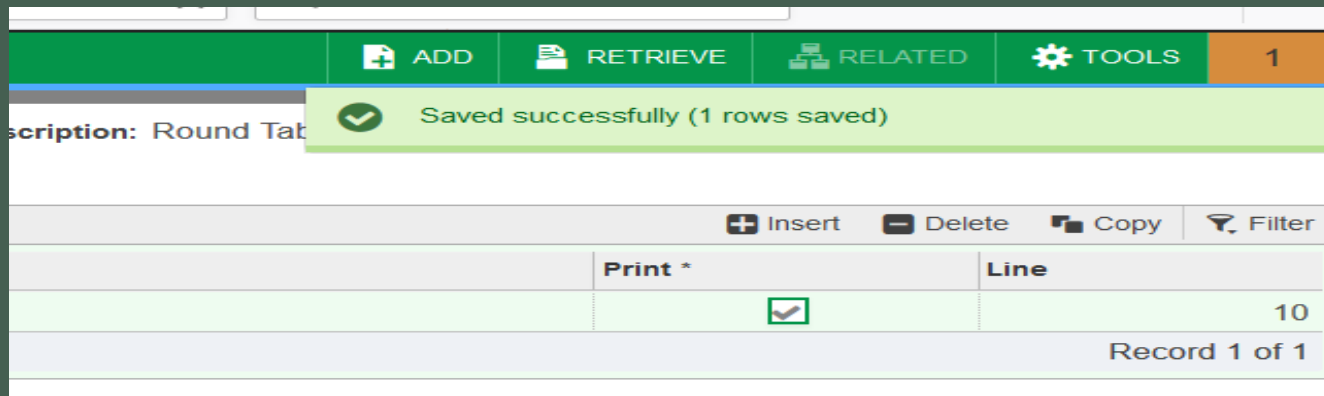
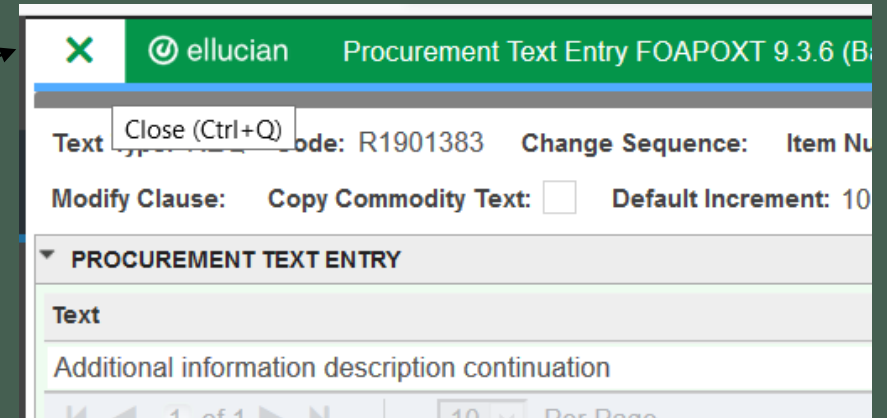
Text	Clause Number	Print *	Line
Additional information description continuation		<input checked="" type="checkbox"/>	

1 of 1 Per Page Record 1 of 1

Click the **Save** Button at the bottom of the screen and check screen for "saved successfully" message. Next, click the **Close** icon.



Close



Click the **Insert** button to add additional line items.

Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text	Add Commodity
1		Round Table Cloth	EA		1.00	100.0000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2		Basic Breakfast combo	EA		10.00	15.0000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1 of 1 | 10 Per Page | Record 2 of 2

Extended Amount	150.00	Tax		<input checked="" type="checkbox"/> Distribute
Discount	0.00	Commodity Total	150.00	
Additional	0.00	Document Total	250.00	

FOAPAL Accounting Section

1. Hold **Alt & Page Down** buttons to continue to account section.
2. Type in Fund and Org, Acct (Account Code).
3. Always use the **TAB** button to move through each section.
4. Click inside USD field to enter dollar amount.
5. Hold **Alt & Page Down** buttons to continue to the next section.
6. Click the **Insert** button to add additional accounting lines.

Additional Document Total

ACCOUNTING Insert Delete Copy Filter

Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSF Override	NSF Susp
1	1	19		119002	4100		0630				<input type="checkbox"/>	<input checked="" type="checkbox"/>

< 1 of 1 > 10 Per Page Record 1 of 1

Extended Amount % USD

Click **Complete** or **In Process** Button.
If successful, you will see a blank screen.

Requestor/Delivery Information	Vendor Information	Commodity/Accounting	Balancing/Completion
BALANCING/COMPLETION			
Vendor	522208632 Sodexo America LLC		Curren
	<input type="checkbox"/> Vendor Hold		Exchange Ra
COA	1 Marshall University		Commodity Reco
			Cou
Requestor	Tracey Brown-Dolinski		Input Amou
Organization	4100 Office of Purchasing		Converted Amou
AMOUNTS			
	Input	Commodity	
Approved Amount	250.00	250.00	
Discount Amount	0.00	0.00	
Additional Amount	0.00	0.00	
Tax Amount	0.00	0.00	
<input type="button" value="Complete"/> <input type="button" value="In Process"/>			
EDIT	Record: 1/1	POSTING_BLOCK.MARK_COMPLETE_BTN [1]	